Membership Setup Guide

© 2025 Icon Systems, Inc.

Membership Setup Guide

© 2025 Icon Systems, Inc.

All rights reserved. No parts of this work may be reproduced in any form or by any means – graphic, electronic, or mechanical, including photocopying, recording, taping, or information storage and retrieval systems – without the written permission of the publisher.

Products referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and the author make no claim to these trademarks.

While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions or for damages resulting from the use of the information contained in this document or the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

Updated: May 2025

Publisher

Icon Systems, Inc.
3330 Fiechtner Drive S, Suite 204
Fargo, ND 58103
https://www.iconcmo.com

Sales
Phone: 1-800-596-4266
Email: sales@IconCMO.com

Support
Phone: 1-218-236-1899
Email: support@IconCMO.com

Table of Contents

Quick Startup Guide 3

IconCMO Software Concepts and Definitions. 3

- Households and Individuals 3
- What is a Group? 4
- Difference between Groups and Talents 5
- Difference between Group Events And Attendance 5
- System Overview 6
- Running Reports, Exports, Labels, or Graphs 10

How Do I...? 13

- Add an Individual or a Household 13
- Add a Household Picture for the Pictorial Directory 15
- Add an Individual 16
- Add, Update, or Delete Individual's Information 17
- Add Notes to an Individual 18
- Record Children in Multiple Household Situations 19
- Transfer or Move an Individual from One Household to Another 20
- Record Deceased or Transferred People 22
- Add a Group 23
- Assign Individuals to Groups 24
- Create Group Events 27
- Take Attendance for Group Events 28
- Add Talents and Assign Them to Individuals 29

Quick Startup Guide

When starting with IconCMO, there are three ways to get your membership information into the system.

1. Import your data from another system or existing spreadsheets. For a reasonable fee, we can convert data to import into IconCMO from other systems.
2. Sometimes, organizations can import their data independently if they have a tech-savvy individual familiar with APIs. IconCMO's API is free to use.
3. The other approach is to enter your records manually. The 'How Do I...' section of this guide explains how to create a household and add individuals to households.

Once the household information is set, you can organize individuals into groups, associate them with specific 'talents,' and set up events for attendance, all of which are described below. You can also assign donor numbers to your people and set up the Donations module, as described in our Donations setup guide.

IconCMO Software Concepts and Definitions.

Households and Individuals

Understanding the difference between a Household and an Individual is important and is defined as follows:

- Definition of a **Household**: A Household is a physical location where people reside, and the name of the household represents the adults who are responsible for the location. It **does NOT** represent an individual. All individuals are listed within the household. Additionally, the household record defines the primary mailing address, alternate address, primary email, and phone (if one exists), status, email history, and directory inclusion options. There is very little individual information displayed on the household screen.

- Definition of an **Individual**: An individual is a person who resides at the household location. Every member (individual) of a family or household should have an individual record. The individual record is where everything about that person is stored – birthdays, marriage dates, personal emails, phone numbers, gender, relationship, what groups and talents they belong to, work information, etc.

- A **Household** example: Mary and Jimmy Jones have three kids; Sarah, John, and Mark. We would have **one** household record named 'Mary and Jimmy Jones', which includes the household's address. Then, there would be **five** individual records, one for each family member.

How does this affect the data input or use of the system?

Example Scenario: The church wants to send a personal mailed invite (or email) to the teenagers about an upcoming event at the church. The church wants the labels addressed only to the teenagers, not the parents. In this case, the individuals' records are used instead of the household

for labels because the household is named after the parents. IconCMO will pull the teenagers' names from their individual records and use the physical addresses from the household record to create the labels.

What is a Group?

Groups divide members into smaller categories to send communications or track a specific group's attendance. IconCMO has two types of groups: Household Groups and Individual Groups.

As of January 2022, household groups are a legacy feature. You will NOT be able to add any new household groups, but can access any *existing* household groups in your account. All functionality from household groups is available in individual groups.

A deeper understanding of the differences between a Household Group and an Individual Group is as follows:

- Definition of a **Household Group**: A Household Group is where the user creates groups and assigns a Household to the group. They first create the group and then can add or remove households as they see fit. Keep in mind that a household is a physical location where people reside, and the name of the household represents the adults who are responsible for that location. Therefore, the labels will have the household name printed on them.

- Definition of an **Individual Group**: An Individual Group is created to track the attendance of individuals in a small group or ministry that meets regularly. It's also used for communication with these individuals. With individual groups, you can send communications to specific individuals or the entire household.

Note about Emails: When households or individuals have the same email address listed under several individual records or when a household's email is the same as one of the individuals, the system will only send the email once. It will not send duplicates to the same email address.

Difference Between Groups and Talents

Understanding the difference between Groups and Talents is important.

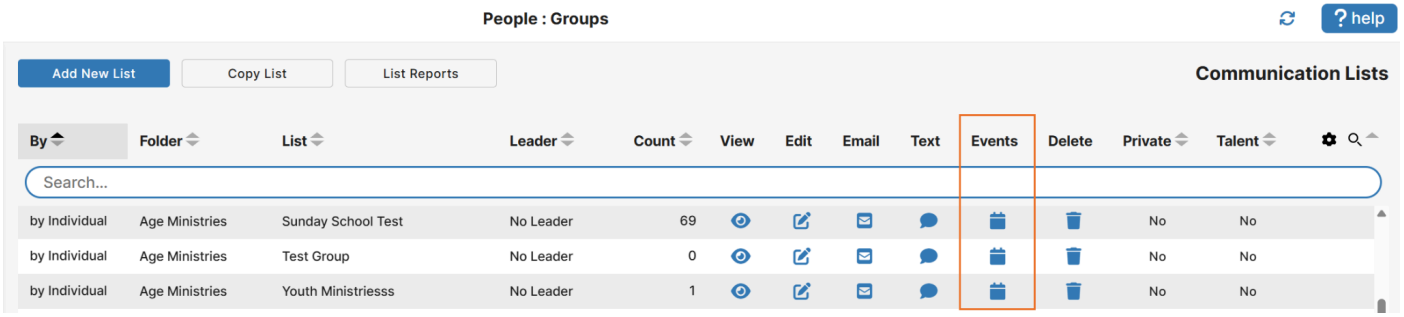
- Some common examples of talent include greeters, plumbers, carpenters, ushers, bookstore attendants, and others. Notice how these describe an individuals gift rather than belonging to a group, such as 'Men's Bible Study' or '5th Grade Bible School.'

- Think of talents as individual gifts that a person is eager to use on behalf of the church to advance its mission. For instance, the mother in a household might have a talent as an usher. Taking this a step further, she could also be part of the '8:30 Women's Bible Study' group while serving as an usher. Other women may join the '8:30 Women's Bible Study' without serving as ushers; however, they could contribute as a plumber or bookstore attendant if they are knowledgeable in those areas.

Difference between Group Events And Attendance

Understanding the difference between Group Events and Attendance:

- Group Events are designed for taking attendance of a specific group of individuals (not household groups). This is completed under People: Groups. Choose the group and click the 'Events' Icon.

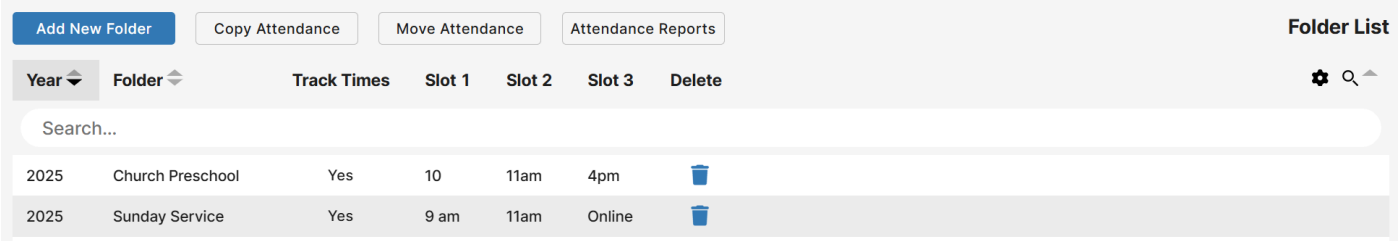


Note: If the Events Icon is not visible on the screen, you must choose to display that column by clicking on the gear icon in the upper right. Then, ensure the 'Events' column is added under Columns to Display.

- To track attendance within the group, you must first add the event. To do this, click the 'Events' icon for the appropriate group and choose 'Add New Event' from the Event List drop-down. Then, you can give the event a name and choose a date. If the event is recurring, you can choose the frequency and end date. If it is not recurring, choose 'Do Not Repeat.'

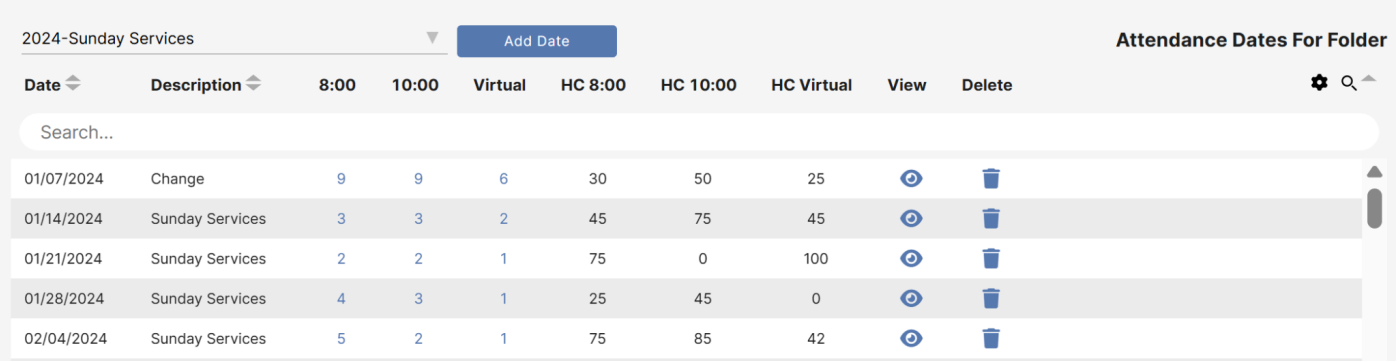
The most significant difference is that when you set up events, you will only have the people in that group to take attendance from instead of the entire congregation.

- Attendance tracks the participation of the entire congregation, typically for weekly services. This is completed under People: Attendance. Attendance can be recorded using individual names, a general headcount, or both. To start, folders and dates must first be set up. The top of the window allows you to add folders and set up time tracking if desired.



Recording Attendance: Once folders are set up and dates are added, go to the bottom of the window to record who attended.

The number shown in blue is the total number of individuals marked as having attended that event. If attendance has not been recorded, this number would be zero. Clicking on this number under the appropriate time slot for any date will populate the individuals list for you to mark who has attended.



Click the checkbox under the correct time(s) for each individual who attended. If you remove the check, the box will return to unattended. Your selections will save automatically.

The bottom of the screen, under the column for each time, will display a running total of the number of individuals you have marked as attended.

Headcount attendance is entered by clicking the number under the Head Count column (abbreviated with HC). Type the number you want to record, and it will automatically save.

System Overview

System Settings Overview

o **Settings→ Preferences→ Church Membership**

This window has several sections: System Default Values, Modify Contents of a Drop-Down List, Other Membership Preferences, and Add Signature to Donation Statement Style Receipt.

System Default Values

- o This allows you to set the default values for denomination, ethnic origin, language, address label format, city, state, zip code, area code, relationship, and gender. You can also create two custom fields for household records and choose whether or not to include new households in the directory automatically. Remember to click 'save defaults' once all changes are made.

Modify Contents of a Drop-Down List

- o Allows values to be added or removed from the standard drop-down list. For example, you can add 'Homebound' to the 'Status' drop-down list for individual and household statuses. In other drop-down lists, you can include values such as Relationship, Denomination, Language,

Countries, Ethnic Origin, Occupation, Gender, Note Type, and User-Defined fields (created in the System Default Values section).

- Maintaining or Modifying Drop-Down List Contents:

▪ Adding a new entry:

1. Select the drop-down list you want to change from the 'Select drop-down list' field.
2. The 'Current name' field will default to 'Add New Entry'.
3. Enter the new entry in the text field 'New / Modified Value.'
4. When finished, press the 'Save New' button.

▪ Change an existing entry:

1. Select the drop-down list you want to change from the 'Select drop-down list' field.
2. Select the entry to change from the 'Current name' drop-down list.
3. Enter the new name in the text field 'New / Modified Value.'
4. Press the 'Modify Drop-down' button. This will change the old name to the new value unless the new value also exists in the drop-down list.
5. When a new modified value already exists, any individuals with the old name will be changed to the new modified value, and the old name will be deleted.

▪ Delete an existing entry:

1. Select the drop-down list you want to change from the 'Select Drop-Down List' field.
2. Select the entry to be deleted from the 'Current name' field, then enter a replacement value in the edit box titled 'New/Modified Value.'
3. Press the button 'Delete Drop-down. '
4. When an individual record's value matches the value to be deleted, the deleted entry will be replaced with the New/Modified value.
5. The replacement value entered must exist in the drop-down list you're working with.

Other Membership Preferences

o Allows changes to phone and email types and special events. Phone and email types such as 'mobile' or 'work' can be added. Special events are milestone dates like birthdays, marriages, confirmations, or anniversaries. Each button launches a sub-screen, as noted below. The church's system administrator should set up these settings, as they affect the entire system. Ll of these settings will show on individual records to enter their personal information.

- Maintaining Phone Types:

▪ Adding a new Phone Type:

1. Enter the name into the Phone Name field.
2. Press the 'Save' button after making your changes.

▪ Changing a Phone Type:

1. Select a phone name from the list of phone names.

2. Change the values.
3. Click 'Save'.

- Deleting a Phone Type:

1. Select a phone name from the phone list.
2. Click 'Delete'. A message will appear, reminding you that this phone assignment will be removed from any household or individual using it.
3. You then have the chance to cancel or continue the request.

- Maintaining Email Types:

- Adding, changing, and removing email names – These options work like the phone options above.

- Maintaining Special Events:

- Add a new event:

1. Press the 'Clear Fields' button to clear out the contents of all the fields.
2. Enter the name of the new event in the 'Name' field. The event name can contain a maximum of 25 characters.
3. Add up to six additional fields to retain information about the event that you want your users to enter.
4. Give each field a name by typing the field name in the edit field.
5. Press the 'Save' button to add the new event to the system.

- Change an existing event:

1. Select the event to change from the list of events on the left.
2. Modify the name of the event or the names of the six user-defined fields.
3. Press the 'Save' button after completing the changes.

- Delete an existing event:

1. Select an event to be removed from the list of events on the left.
2. Press the 'Delete' button. A message will appear, reminding you that the event will also be removed from any individuals to whom it has been assigned.
3. Press 'Ok' to delete.

Note: The system has five default Special Events that cannot be removed: Birth, Baptism, Confirmation, Marriage, and Deceased.

o **Settings→ Preferences→ Personal**

This screen has several sections: System-Wide Preferences, Membership & Donation Preferences, Accounting Preferences, Personal Security, User Email, and Other Personal Preferences.

Note: This screen affects only the logged-in user and not other users on the system.

System-Wide Preferences

- A user can set the fiscal year they want to work in, the date format, and the background image displayed in the system, and switch the accounting menu sections on or off depending on whether or not they wish to see them displayed in the main menu of IconCMO.

Membership & Donation Preferences

- A user can set the default status code and country for data entry purposes.

Accounting Preferences

- Allows the user to set a default date and fund for the accounting side of the system (ie. General Ledger, Banking, AR, AP, Payroll).

Personal Security

- Allows the user to change their current password. To proceed, the user must know their current password. If they don't know their current password, they must use the 'Forgot My Password' feature on the login screen.

User Email

- Allows the user to change their current password or email. It is **very important** for each user to have their current email address stored in the system in case they ever need to reset their password. Icon Systems' employees do not have access to any passwords or the ability to change users' email addresses. Password resets are sent via email.

Other Personal Preferences

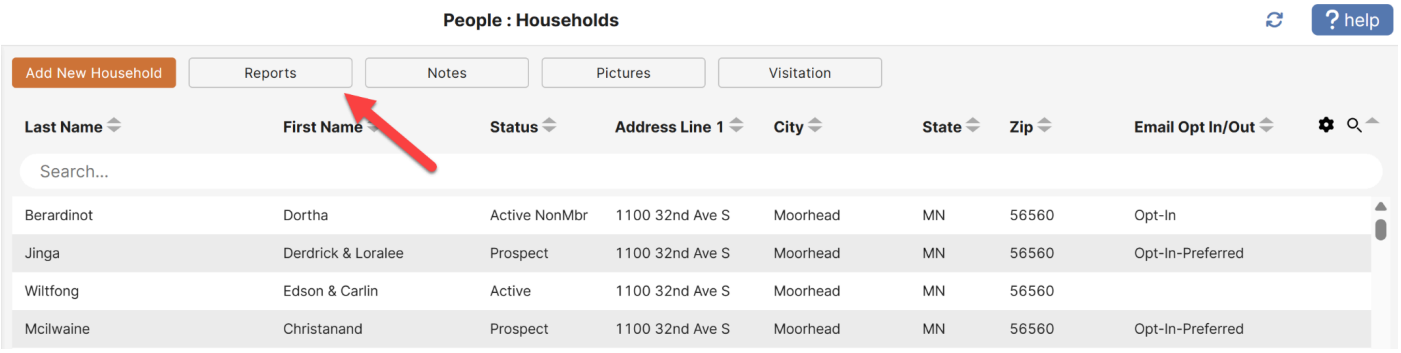
- Allows the user to turn the 'Auto Add' feature on or off to automatically add individual records when a household record is created, thus saving considerable time in creating the necessary individual records. When turned on, this feature will create individual records for those people automatically when there is either an ampersand (&) or the word 'and' between the first names. For example, John and Mary or John & Mary could be used when creating the household record, and the system will automatically create an individual 'John' record and an individual 'Mary' record. This saves time as you only have to add individual records for the children or others in the household.

- **Settings→ Setup→Information**

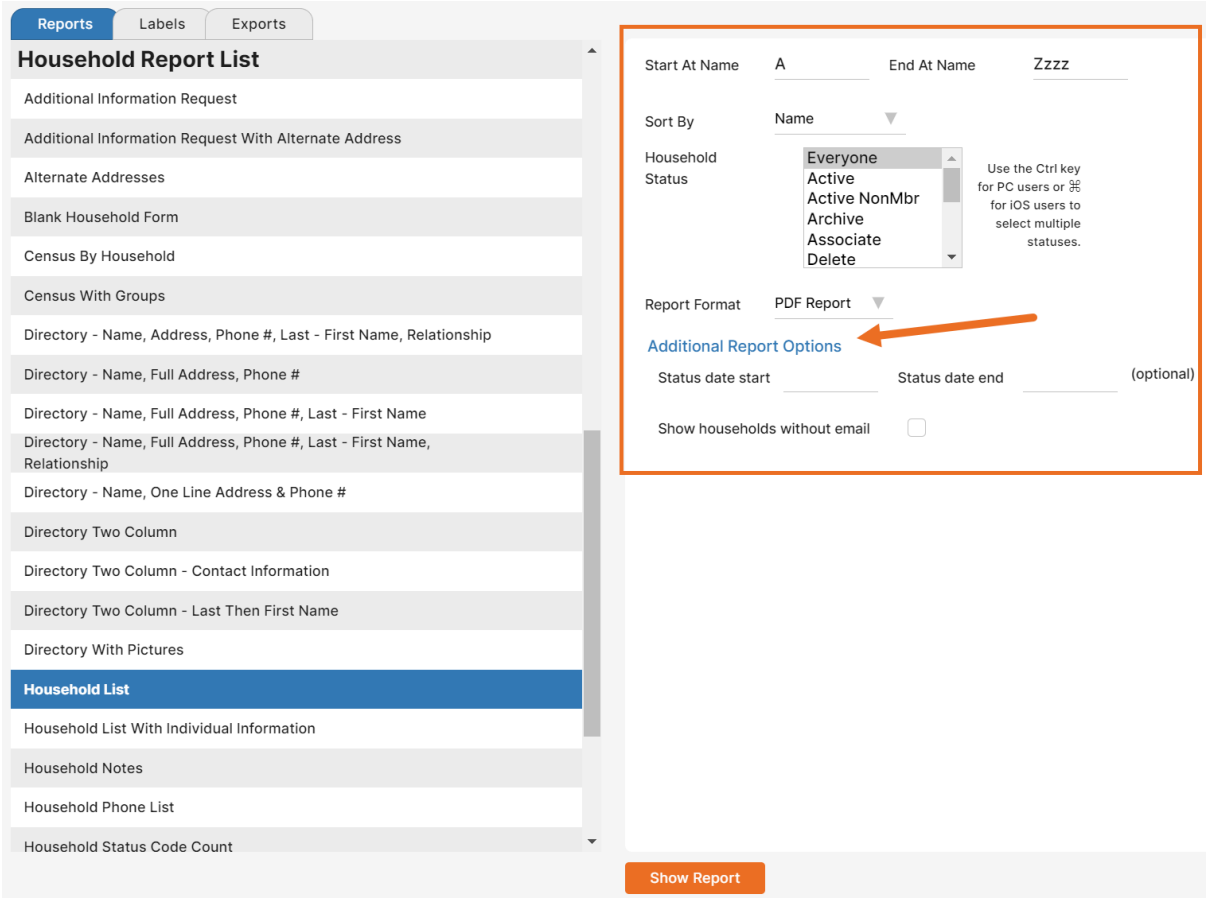
This screen allows you to input the organization name, address, and contact information that will be used throughout the system. It also allows you to upload a logo, which must be in .jpeg format, with a minimum of 75 X 75 pixels and a maximum of 150 X 150 pixels.

Running Reports, Exports, Labels, or Graphs

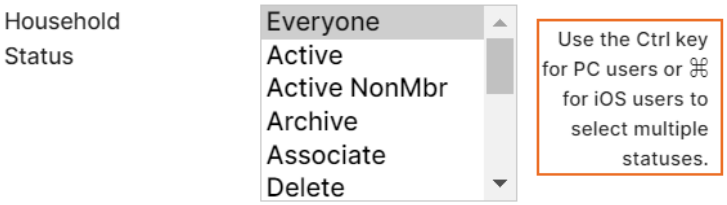
- Many screens on the membership side of the system will give you a list of reports for that module. When you decide what to report on, go to the area where you input that information. Below is an example of where to find the reports for information on Households.



- When selected, the report list appears on the left side of the screen. The 'Household List' report is highlighted and selected in the image below. When you select a report, the filtering criteria for that report will appear on the right. Be sure to look for an 'Additional Report Options' link, as indicated by the arrow in the image below. Click the link to view additional report criteria options. Set the criteria for the report and the output format (PDF, Excel, HTML) as shown. Then click the 'Show Report' button to run the report. If you attempt to output the report to PDF and it doesn't appear on-screen, follow these instructions to set your browser and PDF software correctly.

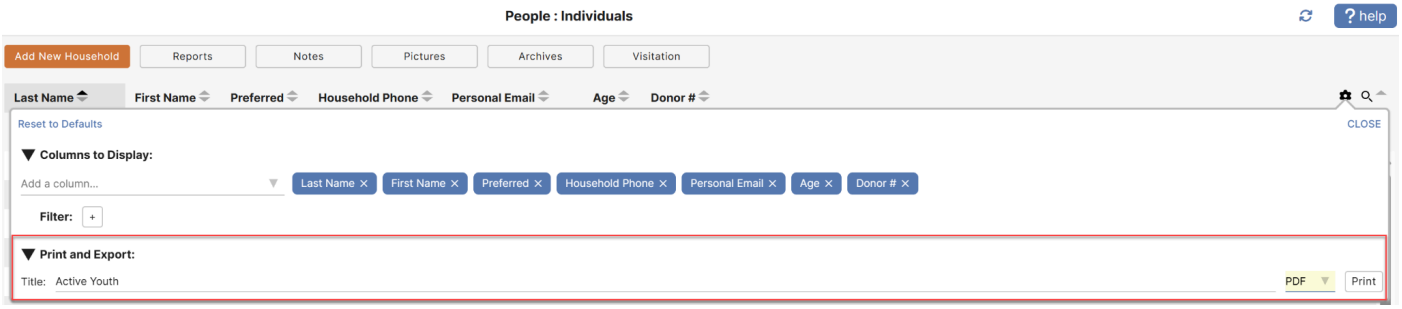


- Various report screens will also allow you to select multiple status codes. This is noted by a message that says, 'Use the Ctrl key to select multiple statuses,' and is pictured below. With the Ctrl key held down, use the mouse to click on the status codes you wish to include. After making status selections, release the Ctrl key and run the report.

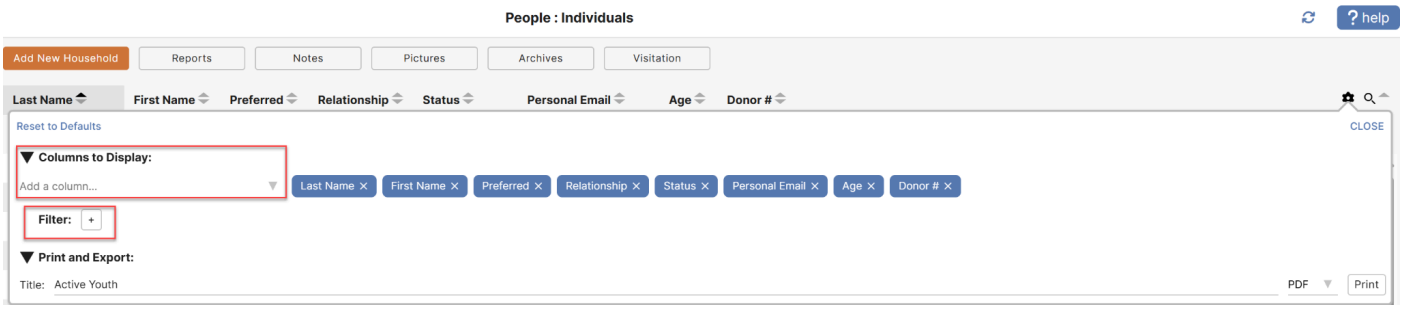


Note: When running reports, it's beneficial to understand what kind of data you are seeking. For example, if you want a birthday report, go to the individual reports, not the household reports. Why? Because households don't have birthdays, individual people do. Similarly, if you were looking for a directory or address labels, you would go to household reports, as directories and household reports have the address and household information, with some individual information.

- Additionally, you can run custom reports from several screens in the system as well. The images in the examples below are from the People→ Individuals screen.

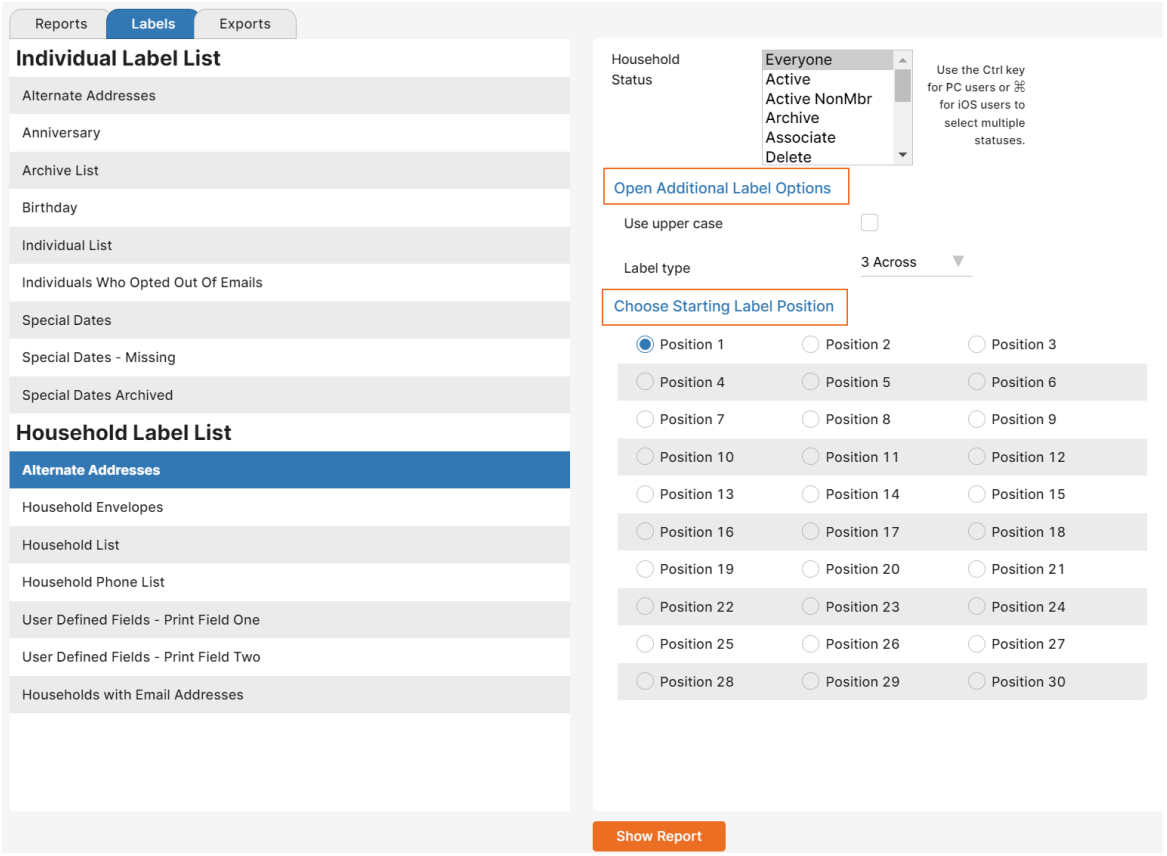


- The title is populated by default; however, you can change the name by overwriting the text in the field. You can also choose which format to display the report in: PDF, HTML, or Excel. The report will have what your screen shows based on the columns you have selected to display and the filters that you have added.

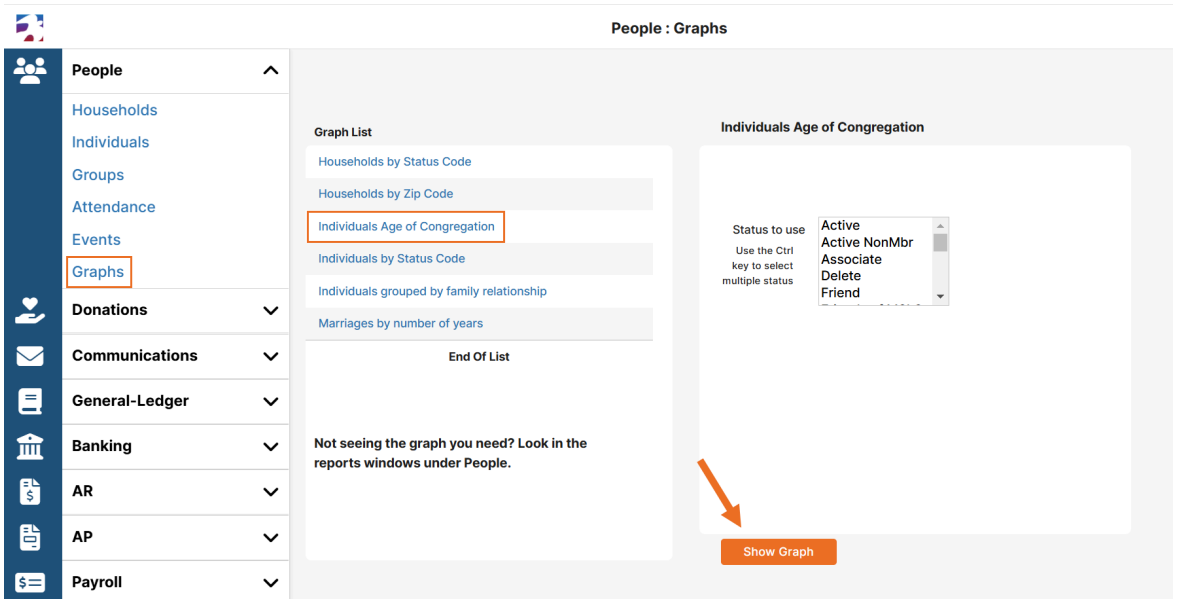


The system remembers your selections when you exit those screens so that the same selections will be displayed the next time you visit them. There is a 'Reset to Defaults' option that will clear all previously selected filters and criteria from that screen.

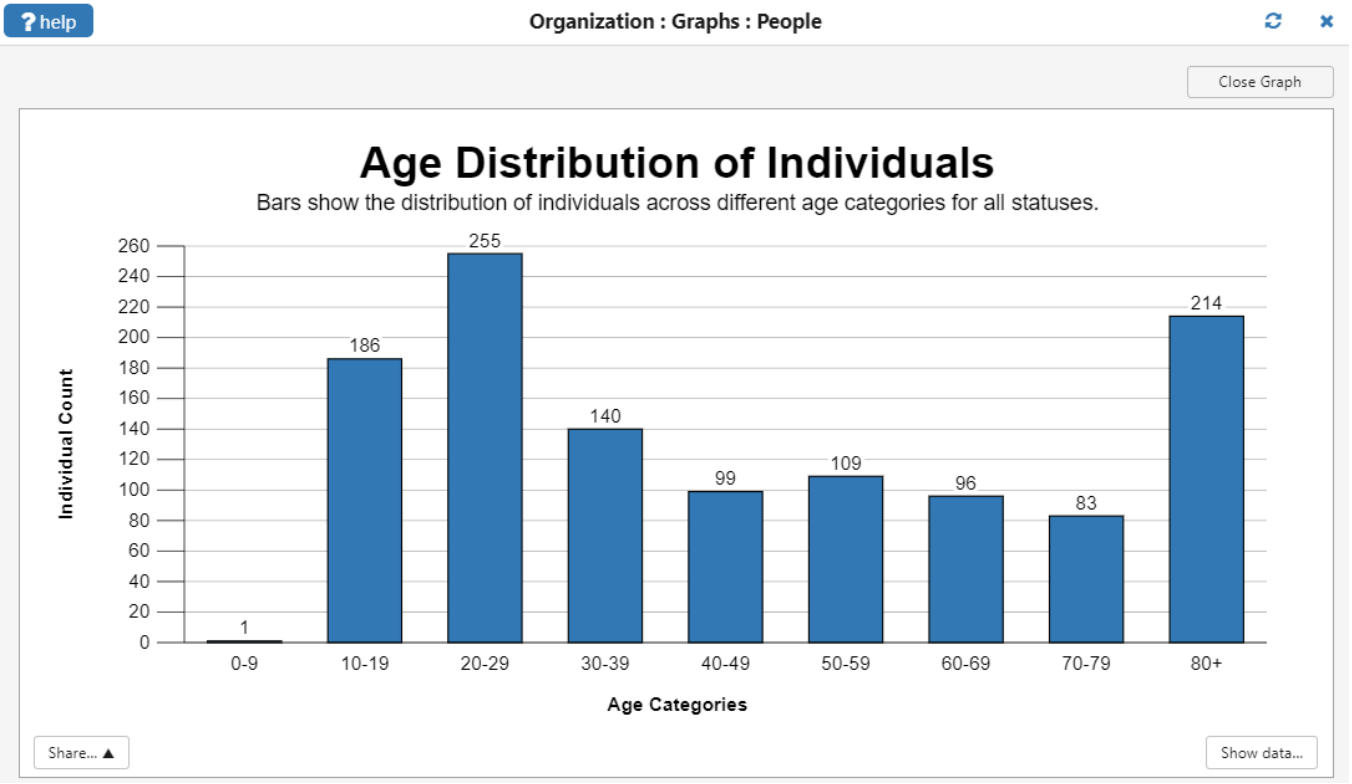
- Creating a label or an export on the system is very similar to how reports are created in the Reports screens of each module. Choose the tab with the word 'Exports' or 'Labels,' and you will see a list on the left where you can choose one of the exports or labels. Then, the filtering criteria will be displayed on the right. Once your criteria are selected, click 'Show Report'. For Exports, you can either select 'Excel' or 'tab-delimited' for the file type using the drop-down list that is just below the status box. For Labels, you can choose 1 across, 2 across, or 3 across. You can even choose the label starting position. Just be sure to click on the links for additional options.



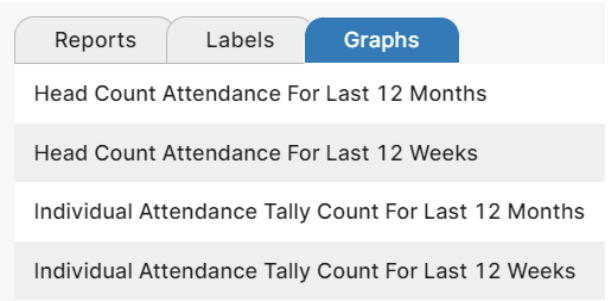
- Graphs are run in the same way as reports. Graphs can be found under each respective module. Graphs for people are under People: Graphs. Graphs for Donations are under Donations: Graphs, and Graphs for accounting are under General-Ledger: Graphs. Below is an illustration of the 'People' graph screen, which shows the 'Individuals Age of Congregation' graph.



o After you click the 'Show Graph' button, the graph will appear on the screen, as seen below. On this screen, there are several options. Under 'Share,' you can either download the graph as an image or a PDF, or you can copy the image to your clipboard and attach the file to a newsletter or email.



o Some of the graphs, such as attendance graphs, can be found on the respective reports screen in their own tab.



How Do I...?

Add an Individual or a Household

The following are helpful hints regarding household field definitions. You should consider them when adding this type of data to your system. Consistency is the key to good data entry and accurate reports.

o Title:
- If Married Couple, Title = Mr. & Mrs. or Mr. & Dr.
- If Single Person, Title = Mr. or Mrs.
- Many people will leave this field blank.

o First Name:
- If Married Couple, First Name =John & Mary or Mary & John.
- If Single Person, First Name =John or Mary.
- This field is never blank. It must contain the Head(s) of households (i.e., the responsible parties in the household).

o Last Name:
- If Married Couple with the same last name, Last Name = Anderson.

- If Married Couple with different last names, Last Name = Anderson(Smith). The primary last name of the household would be Anderson, and the Secondary name would be Smith.
- If the Married Couple has different last names and the one is hyphenated, the last name Smith after the name Anderson: Last Name = 'Anderson(-Smith).' The parentheses are necessary to distinguish that one person does not hyphenate their name.
- If the Married Couple both hyphenate their last names, Last Name = Anderson-Smith.

o Status:

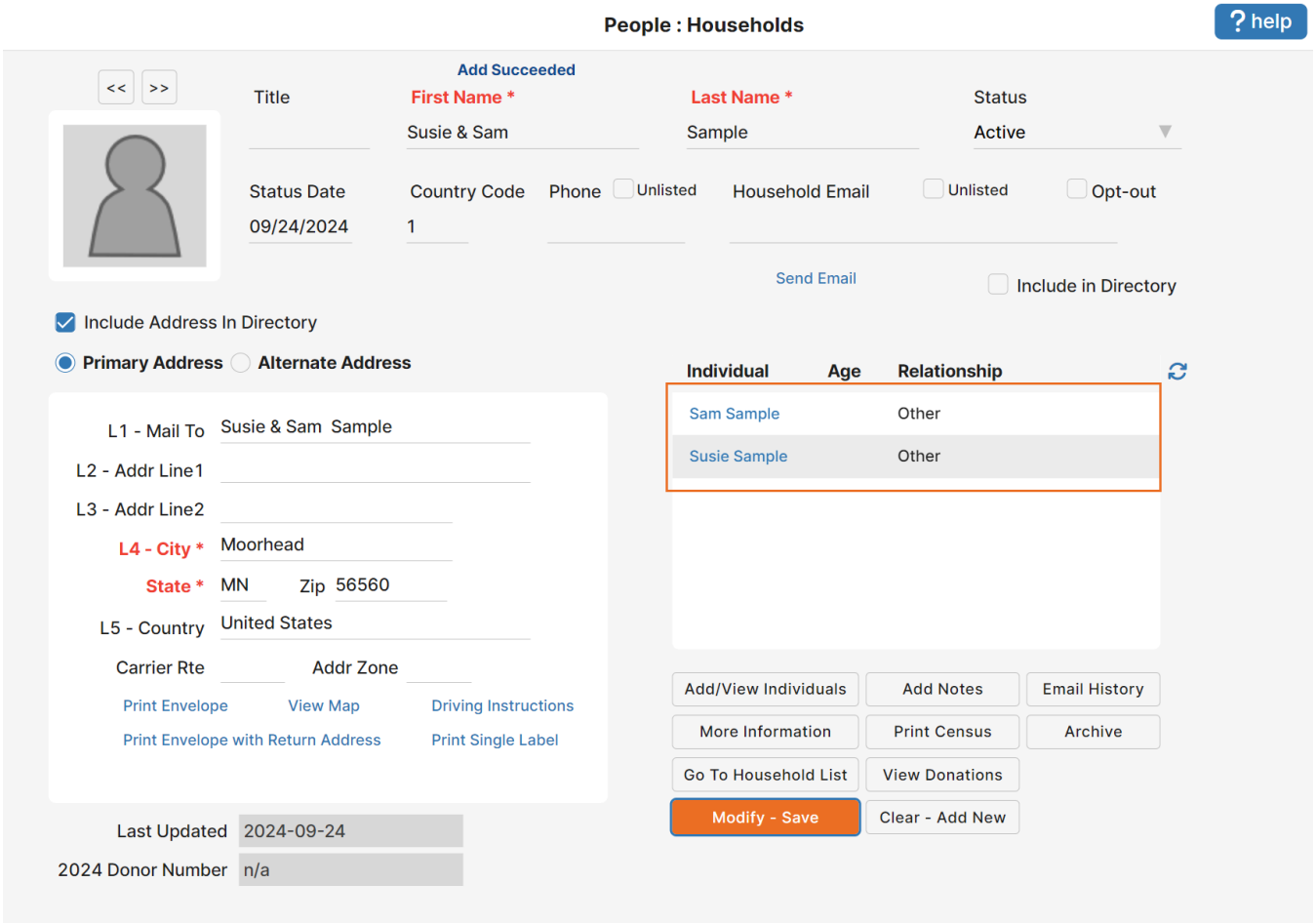
- The status field is used to designate different types of households. You can add as many statuses as needed by going to Settings → Preferences→ Church Membership. On the right side, locate the section labeled Modify the Contents of a Drop-Down List. In the field 'Select Drop-Down List,' select 'Status.' Enter the status you wish to add to the New / Modified Value and click the 'Save New' button.
- Do not add a status code where an individual can fall into multiple codes. For example, don't add 'Choir' since a choir member can also be an 'Active Member.' Don't add 'Employee' since an employee could have a status of 'Active Member' or 'Friend. ' Choir members belong to Groups.

o Status Date:

- The Status Date can be used in several ways. Most use that date field as the first time someone came to church, or the date they became a member.

Note: IconCMO has a feature that, when turned on, automatically adds individual records for the main people named in the household record. Please see the System Overview to see how this works.

In our example, we added a household for Susie and Sam Sample, so we included both names in the First Name field. When we save the household, individual records for both people are added. Click 'Add/View Individuals' to add additional individuals to the household, such as children.



o Single-Person Household: If you add a new person to the system who is the only individual in their household, the household record would be added first, reflecting the physical residence, and then one individual record would be added representing the individual living at that location.

o You can watch this video on how to add a household to IconCMO.

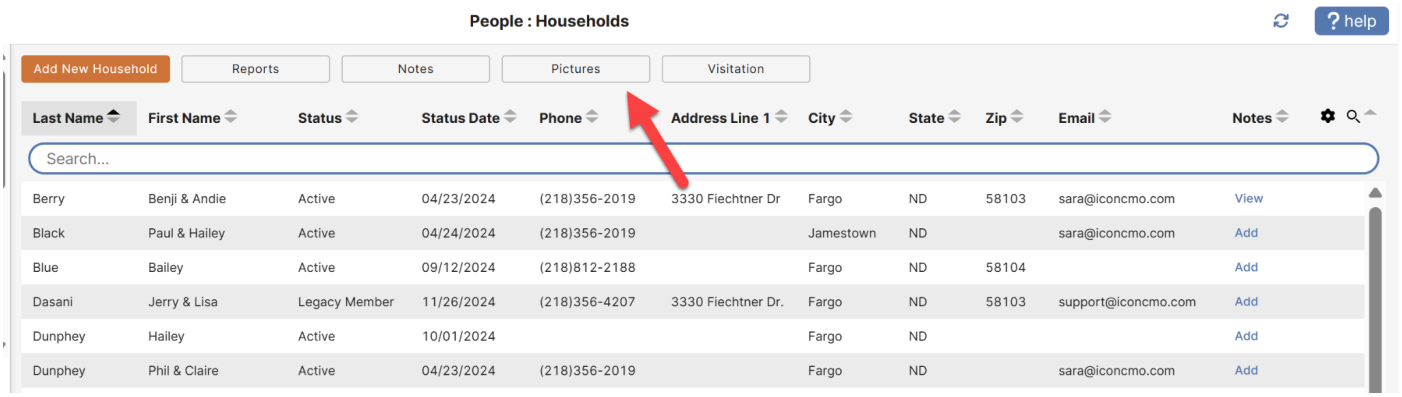
Add a Household Picture for the Pictorial Directory

You can access the screen to upload household photos in two ways. The screen works the same way in both instances.

o In the household record, you can click the image in the upper left corner of the screen. If no household picture is in the system yet, it will appear as shown below.

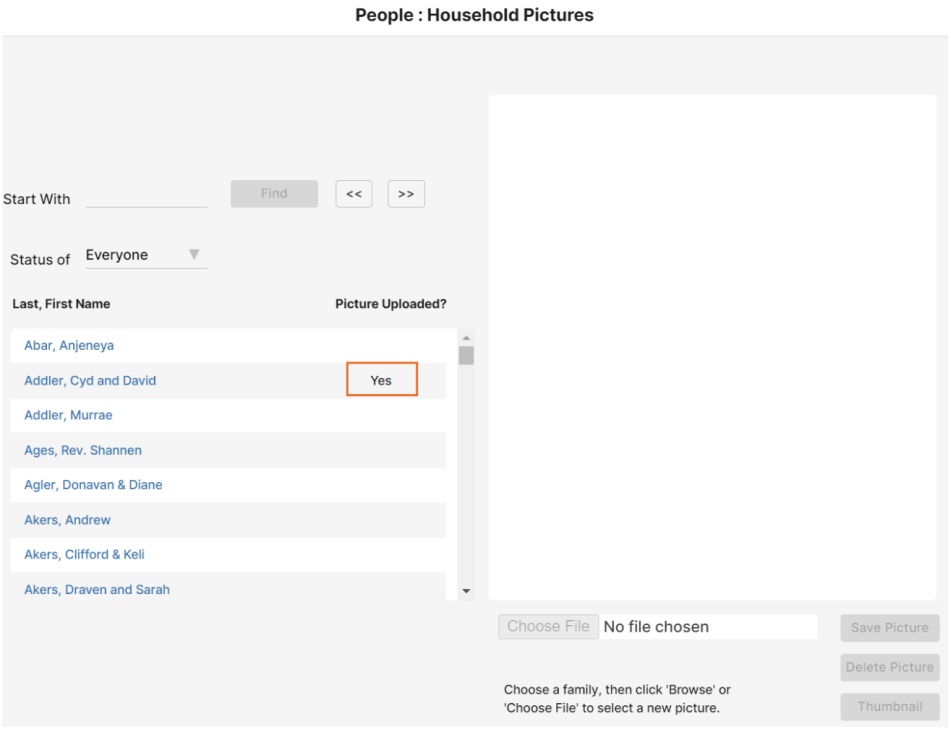
o Hover your mouse over the picture and click on it. The 'Household Pictures' screen will appear.

o Another means of access is by going to the People→ Households screen. At the top of the household screen, there is a 'Pictures' button.



o This will bring you to the household pictures screen, as seen below.

o Any household with a picture will have a 'Yes' in the 'Picture Uploaded?' column.



1. Select the household on the left to upload a picture.
2. Click 'Choose File' and locate the picture on your computer.
3. Click 'Save Picture'. The system will upload the picture in a few seconds. Once it has, you should see the uploaded image on the right.
4. You can delete a picture by choosing the household on the left and clicking 'Delete Picture'.

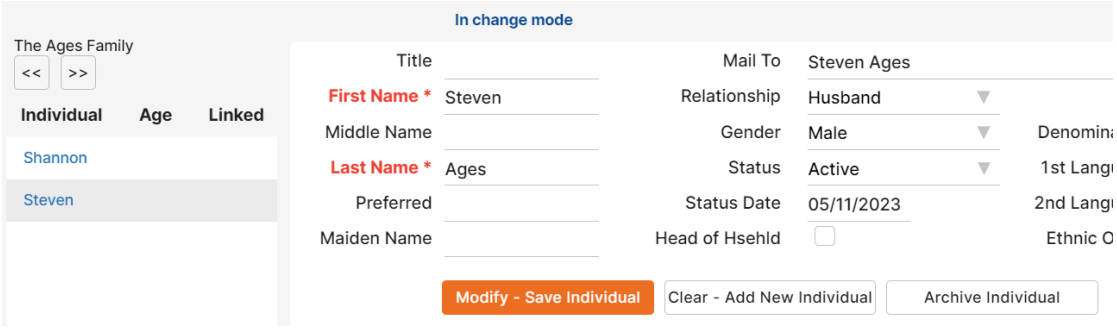
Note: This same process can be done to upload individual photos under the Individuals screen.

Add an Individual

An individual must be attached to a household. Therefore, you cannot add an individual unless the household exists first. If you need to add a household first, please see the topic 'Adding a Household'.

1. Go to People → Households.
2. Click on the household name to which you wish to add an individual.
3. Click 'Add/View Individuals' at the bottom right to open the Individual Form.
4. Enter the Individual's first and last name. Other data that can be entered includes relationships within the household, gender, denomination, language, ethnic origin, status, and preferred and maiden names.
5. Click 'Save Individual' to save the record. The individual's name will appear on the left side with the other individuals' names in the household, as seen below.
6. To add another new individual, press 'Clear-Add New Individual' and follow the above steps for the next individual in this same household. It is not necessary to go back to the household list unless the individual you're adding belongs to a different household.

o You can also watch this video on how to add an individual to IconCMO.



Add, Update, or Delete an Individual's Information

Generally, updating an individual's information in IconCMO is done in one place: under the individual record.

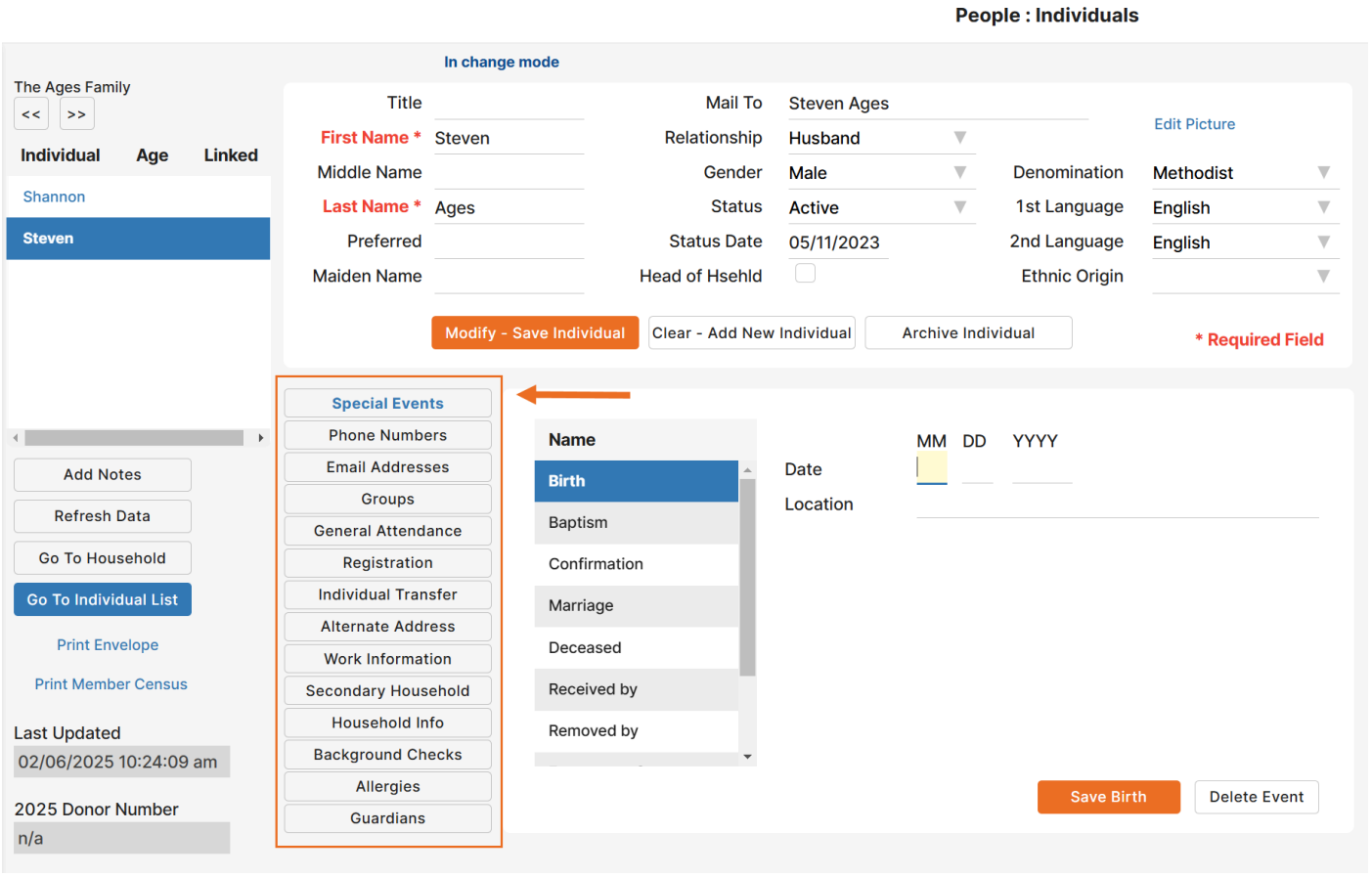
1. Go to People → Individuals.
2. Click the individual for whom you wish to modify data.
3. Select the data you want to modify. You can modify any of the information mentioned in the 'Add individuals' process or any of the options seen in the orange box in the image below, such as Special Events, Phone Numbers, Email Addresses, Groups, General Attendance, Registration, Individual Transfer, Alternate Address, Work Information, Secondary Household, Allergies or Guardians (works with Check-In Kiosk in the Events module.)

▪ General Attendance can be viewed on this screen, but cannot be modified. To modify attendance, go to the Attendance module.

▪ Registration can be viewed on this screen, but cannot be modified. The entries on this screen come from an individual's registration for an event created in your Events module.

▪ 'Household Info' can be viewed on this screen but not modified. To modify household info, click 'Go To Household' on the left side.

▪ 'Background Checks' is an option that gives you an integrated link to log into Protect My Ministry directly from this screen once you have signed up for it. If you have never signed up, this screen will display a message to find out more by following a link to our Partners & Integrations window.



o Depending on which option you choose from the list outlined in the picture above, the information in the area to the right will change, allowing you to enter the appropriate data. For many options, a save button will also appear in the area to the right for you to click once you are done adding or changing the data. If you wish to delete the data, many options use the delete button in the same area. Don't confuse the save or delete button in the bottom portion of this screen with the 'Modify- Save Individual' or 'Archive Individual' buttons for the primary individual form at the top of this screen, or you may not get the desired results

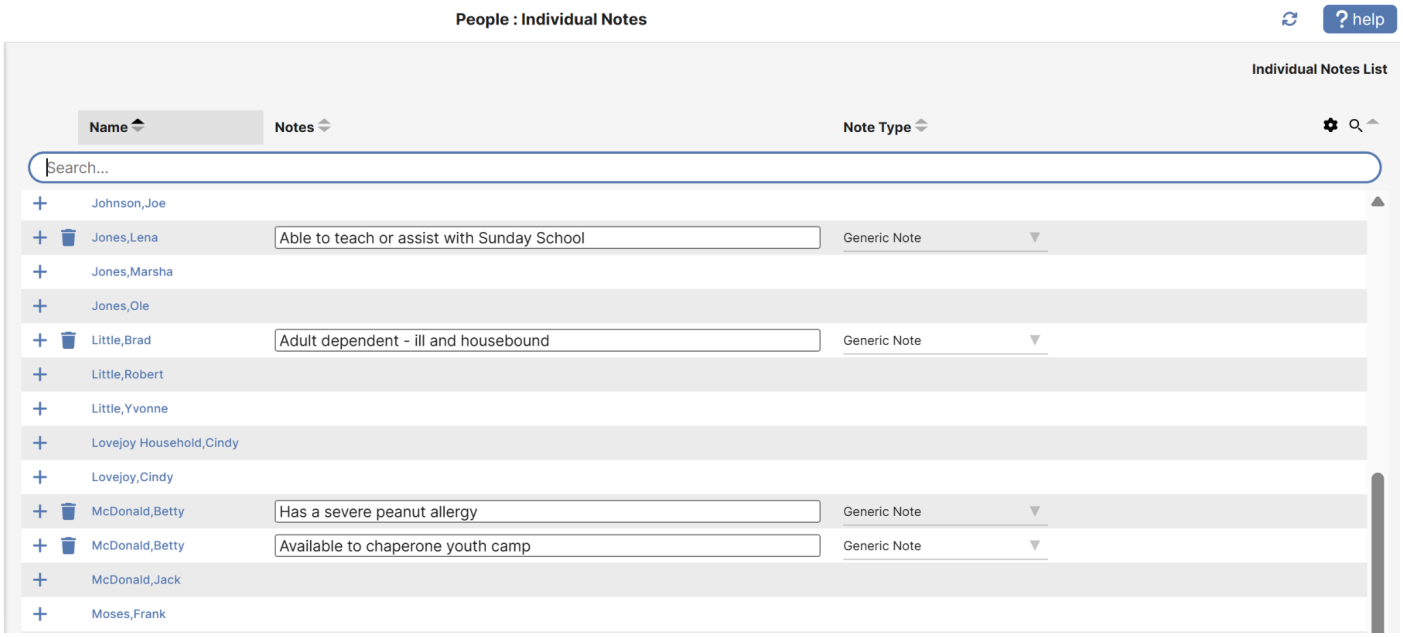
Note: You can customize many of the drop-down menus such as Special Events, Phone Name, Email Name, and Occupation by going to Settings→ Preferences→ Church Membership→ Modify Contents of a Drop-Down List, Maintain Phone - Email Types, or Maintain Special Event Types.

Add Notes to an Individual

There are two ways to access the screen to add individual notes. The screen works the same way in both instances.

1. Go to People: Individuals. Click 'Notes' at the top of the window, or open a specific individual record and click 'Add Notes' on the left. (If notes exist, the button will say 'Add/View Notes.'
2. Click on the plus sign to the left of the individual's name for whom you want to add a note. A new window will open, allowing you to document the note.
3. Type your note and click 'Close' to complete the note. Once you are back in the main window, you can enter a note type and dates.
4. To add note types, go to Settings: Preferences: Church Membership. Choose the list for Note Type under 'Modify Contents of a Drop-Down List.'

5. To edit a note, click on its text to open it and make changes. To delete a note, click on the trash can icon on the left side of the note.



Note: Household Notes are a bit different. Select your household from the list on the left. Type your notes in the box to the right, then click the 'Save Notes' button near the bottom of the window. There is only one note box per household, and no note types to label them.

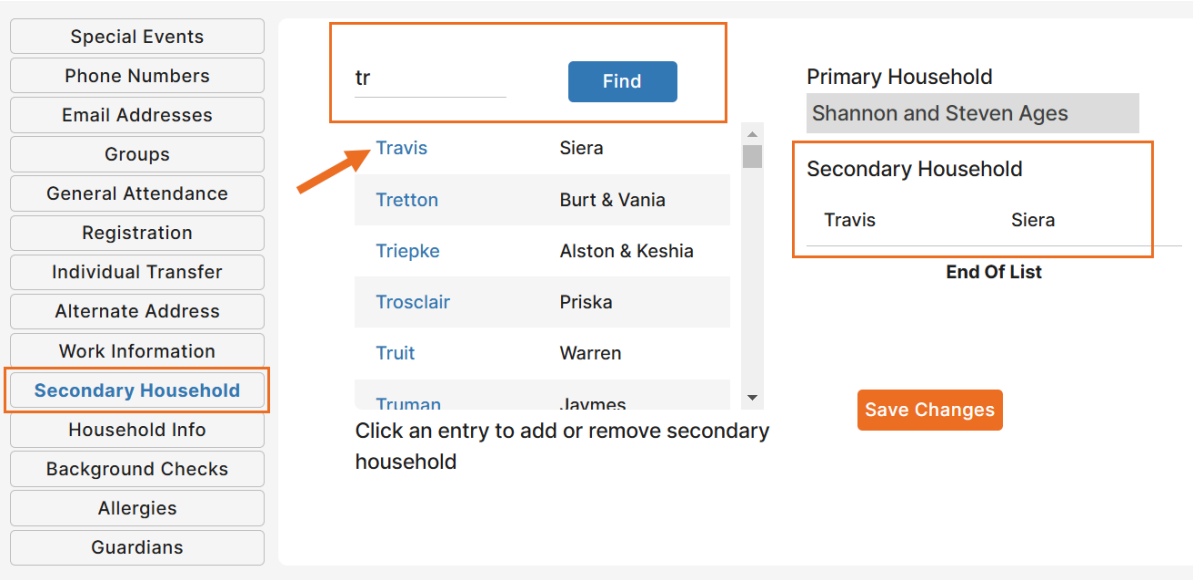
Record children in multiple household situations

The Secondary Household feature is used to identify an individual belonging to multiple households. The most common scenario is when a child of divorced parents spends time at both houses.

1. On the individual record, locate the Secondary Household tab. The Primary Household to which the individual belongs will be listed on the right.
2. To add a secondary household, enter a few letters of the last name and click 'Find.'
3. Select the household from the list below, and that household name will appear on the right under Secondary Household. You can add multiple Secondary Households.
4. Make sure to click 'Save Changes.'

o To remove a Secondary Household from the list, click on the household name.

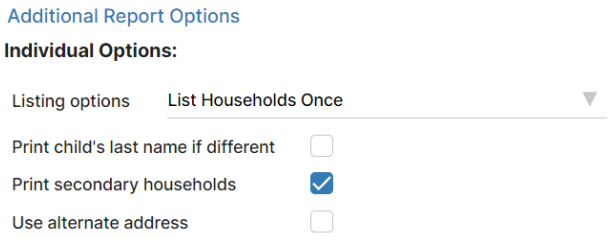
o In the primary household record, you will see a checkmark under the 'Linked' column next to the individual, denoting another household linked to that particular individual.



o You will also notice in any secondary household that the individual is listed in the family members box, and under the 'Linked' column, you will see the last name of the primary household. When you click on the name under the 'Individual' column for the linked individual, the system will bring you back to that individual's record within the primary household.

Individual	Age	Relationship	Linked
Priska Trosclair	75	Single Female	
Hiwot Trosclair	25	Daughter	
Amaryah Bussard	88	Single Female	Bussard

o When printing directories, an individual linked to multiple households can be displayed under all linked households when the 'Print secondary household' option is selected under 'More Settings' in the report criteria. You may also choose to print the child's last name (or not) if it differs from the household's last name.



Note: Links to secondary households are removed when the households or linked individuals are archived. To retain this information in the archives, you will have to enter it manually in the notes.

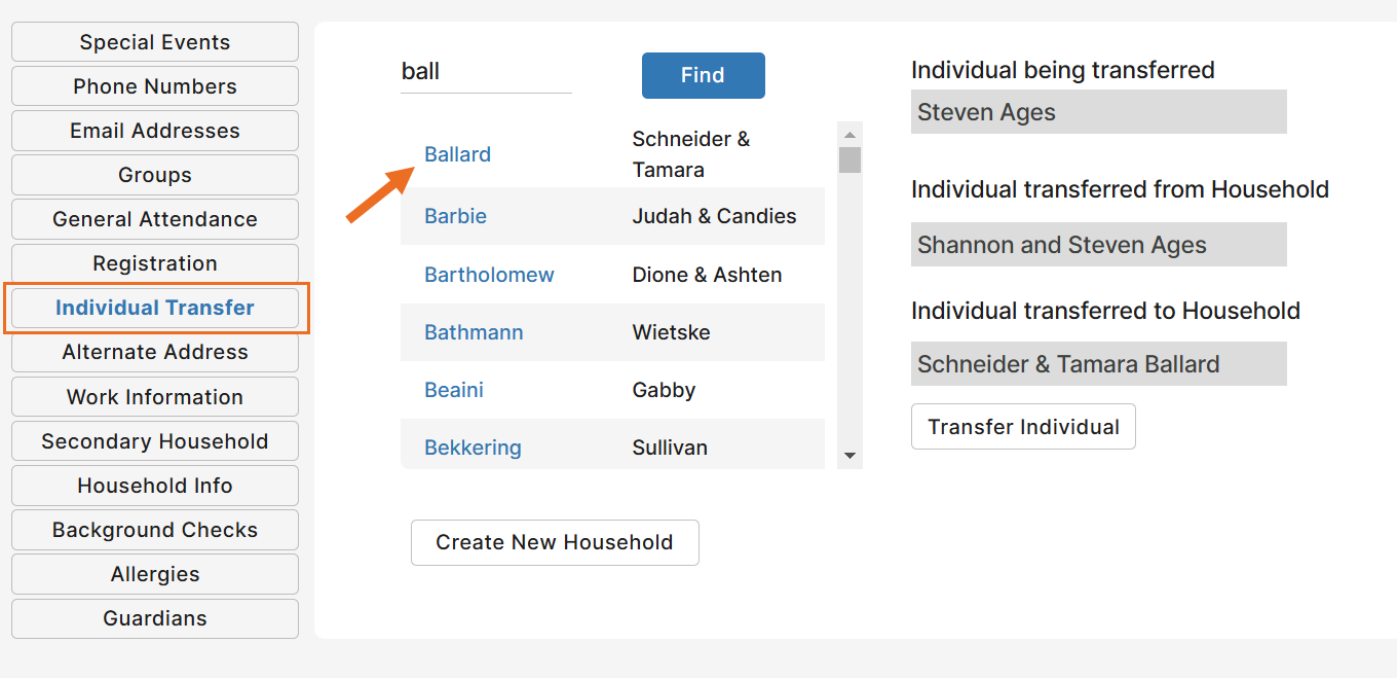
Transfer or Move an Individual from One Household to Another

This function is used to move someone out of their current household and into a new household.

o If transferring to another household that already exists in the system:

1. Go to People → Individuals.

2. Click on the individual you wish to transfer.
3. In the list of data entry options on the bottom left, select 'Individual Transfer.'
4. In the white box next to the 'Find' button, enter the Last Name of the household to which you wish to transfer the individual, and then click the 'Find' button.
5. Click on the Last Name of the Household you wish to transfer the individual to.
6. Click 'Transfer Individual'.

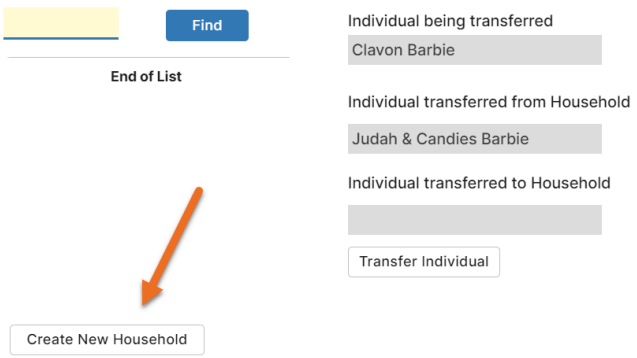


o If the individual is moving into a household that does not yet exist:

1. Go to People → Individuals.
2. Click on the individual you wish to transfer.
3. In the list of data entry options on the bottom left, select 'Individual Transfer'.
4. Click 'Create New Household'.

- A new household will automatically be created based on the individual's name, and the individual will be moved into and out of the original household.

- All information about that individual, including groups, attendance, and giving records, will remain with the individual and transfer to the new household.

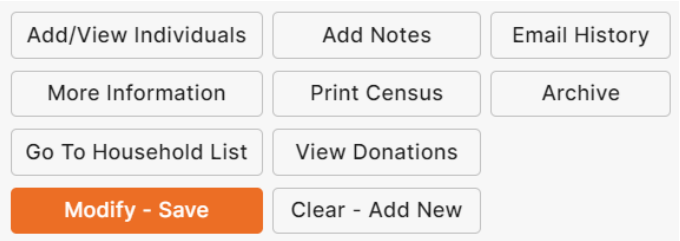


Recording Deceased or Transferred People

There are two ways of data entry for deceased individuals, depending on your situation.

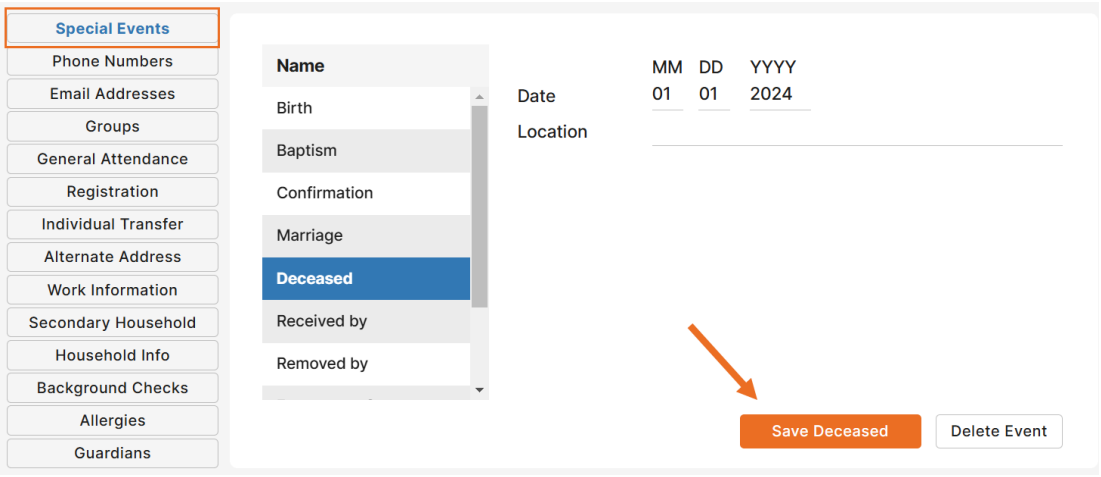
- If the person is the only individual in the household:

1. First, check whether any donations are attached to the deceased individual or their household.
2. If there are, you will want to go to Donations → Statements and print two copies of the statement for that household. One copy should be for the church records, and one should be mailed to the person handling the individual's estate.
3. Since this is the last person in the household, you can archive the entire household. Go to People→ Households, locate the household, and click on it to view the record.
4. Click 'Archive' in the bottom right of the Household screen.
5. A pop-up message will ask you to enter a reason for archiving the individual. Enter 'Deceased.'
6. Click 'Archive. '



- If the household the deceased is in has other individuals in it:

1. Go to People → Individuals, locate the deceased individual, and click on it to open their record.
2. Add a deceased date for the individual under their special events.



3. Once this is added, click the 'Archive Individual' button.
4. A pop-up message will ask you to enter a reason for archiving the individual. Enter 'Deceased.'

5. Click 'Archive. ' When you're done, the household will still exist, but that specific individual will no longer appear in the household.

o The information will be retained, and the individual can be unarchived if needed.

1. Go to People → Individuals
2. Click on 'Archives' at the top.
3. Locate the desired individual.
4. Click on the record to open.
5. Choose 'Unarchive' in the bottom left corner.

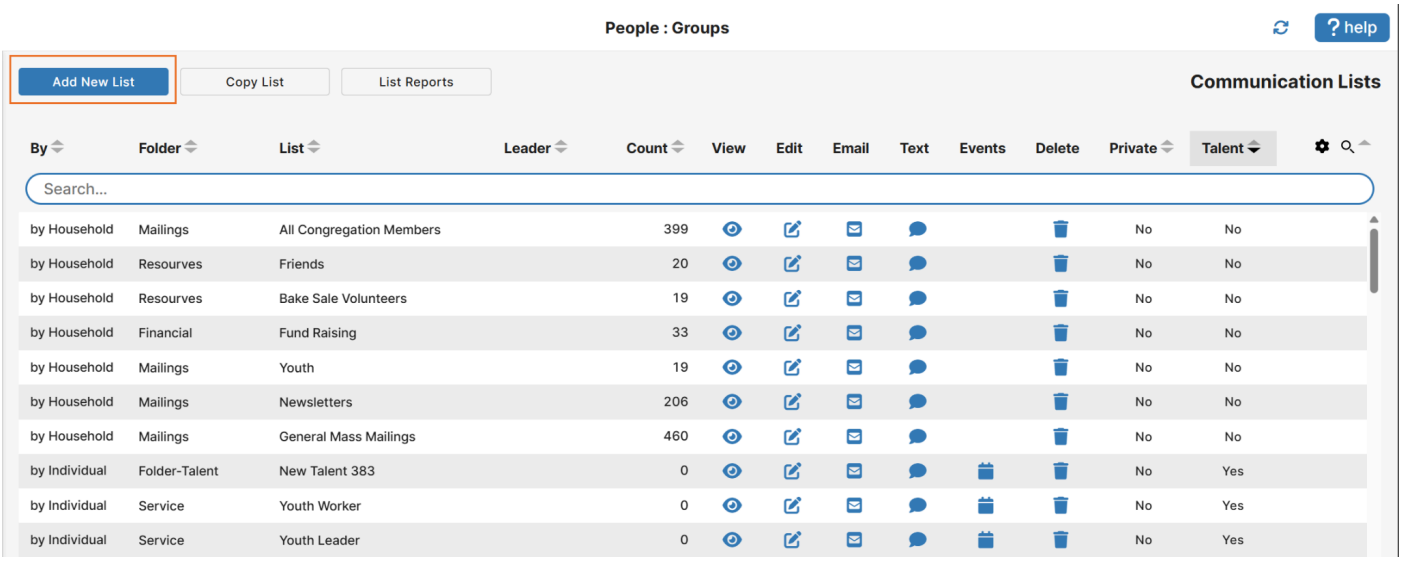
- You can delete individuals once they are in the archives; however, we don't recommend deleting individuals unless they were entered into the system in complete error.

Note: Archived individuals don't count against your household count for pricing, so you can have as many archived records as necessary.

Add A Group

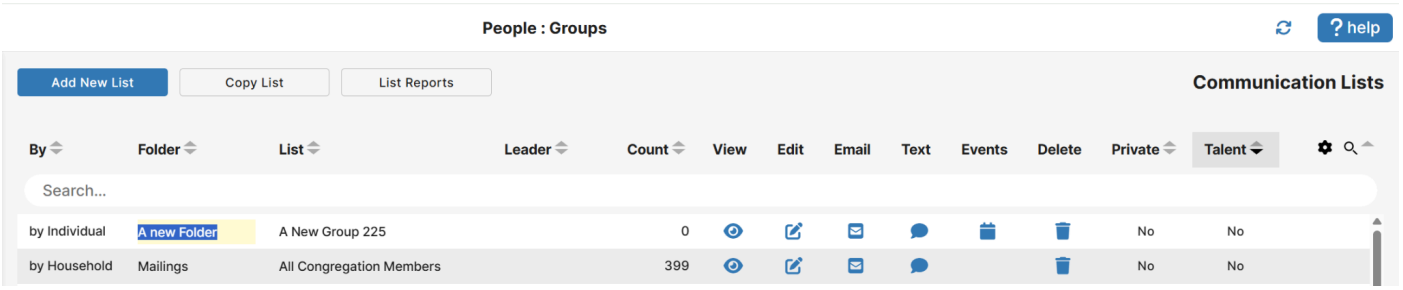
Note: As of January 2022, **household groups are a legacy feature.** To learn more about household groups, visit the What is a Group? section of this guide.

1. Go to People → Groups.
2. Click 'Add New List' at the top of the screen.
3. This will create a brand new line in the Group list. Overwrite the text to enter the folder to which the group belongs and assign the group a name.



By	Folder	List	Leader	Count	View	Edit	Email	Text	Events	Delete	Private	Talent
by Household	Mailings	All Congregation Members		399							No	No
by Household	Resources	Friends		20							No	No
by Household	Resources	Bake Sale Volunteers		19							No	No
by Household	Financial	Fund Raising		33							No	No
by Household	Mailings	Youth		19							No	No
by Household	Mailings	Newsletters		206							No	No
by Household	Mailings	General Mass Mailings		460							No	No
by Individual	Folder-Talent	New Talent 383		0							No	Yes
by Individual	Service	Youth Worker		0							No	Yes
by Individual	Service	Youth Leader		0							No	Yes

- The default, as seen below, is to place all groups into a folder named 'Folder' and assign them a name with a group number, like 'New Group 223. '



o Naming the Group Leader and marking the group as Private or as a Talent list are additional options.

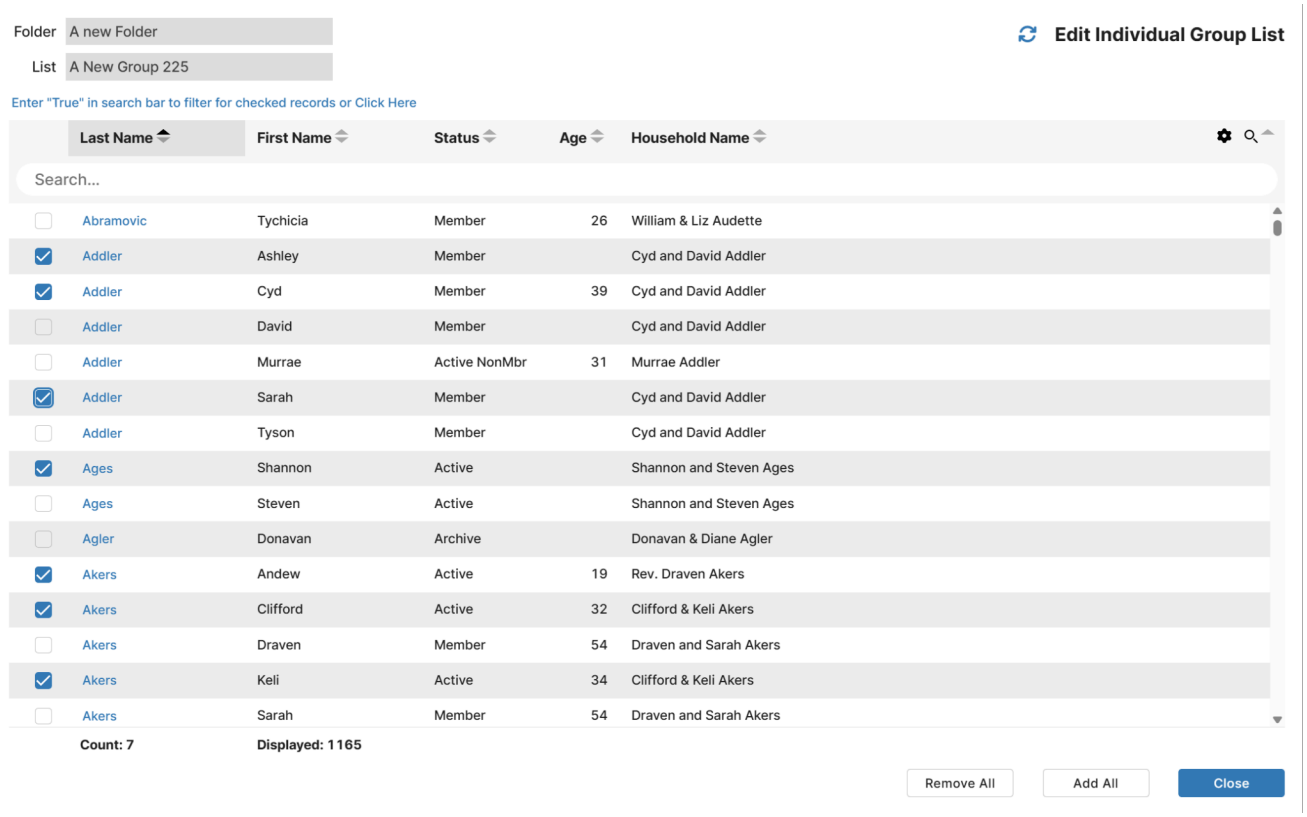
1. Group Leader defaults to 'No Leader' but can be overwritten.
2. To change a group to Private, click on the 'No' button, which toggles it to 'Yes'. Marking a group as private would prevent the individual from seeing that they are a part of the group when viewing their information in the Member Portal.

Assign Individuals to Groups

Once groups have been created, individuals can be assigned to them. There are two ways to do this.

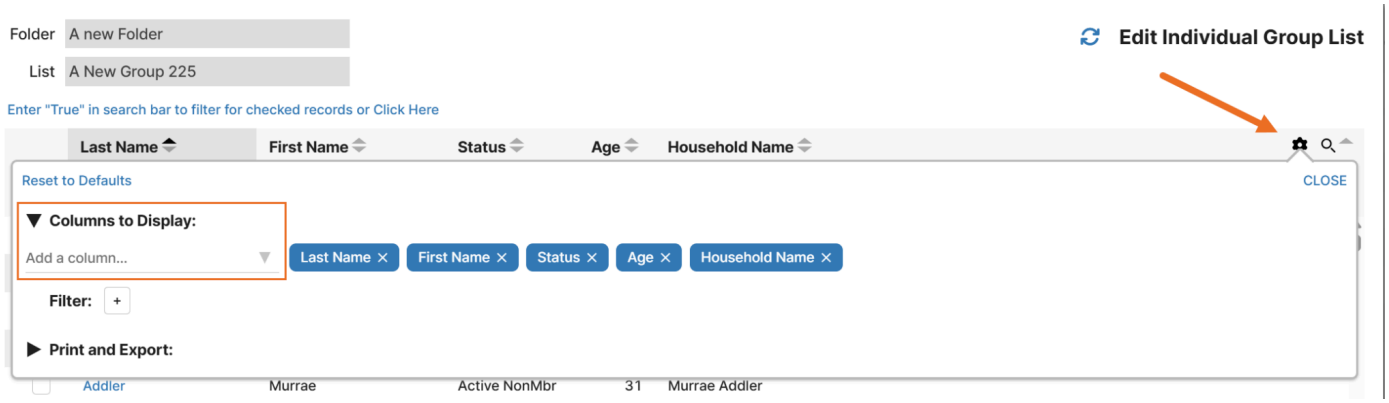
o From the Groups window:

1. Once groups and folders have been added, you can add group members by clicking the icon in the 'Edit' column for any given group. This will launch a new screen.
2. Use the checkboxes to add or remove members from the group.
3. You can also use the filters and/or the "Assign All" and "Remove All" buttons to add or remove individuals quickly.
4. Click 'Close' to exit the edit window.



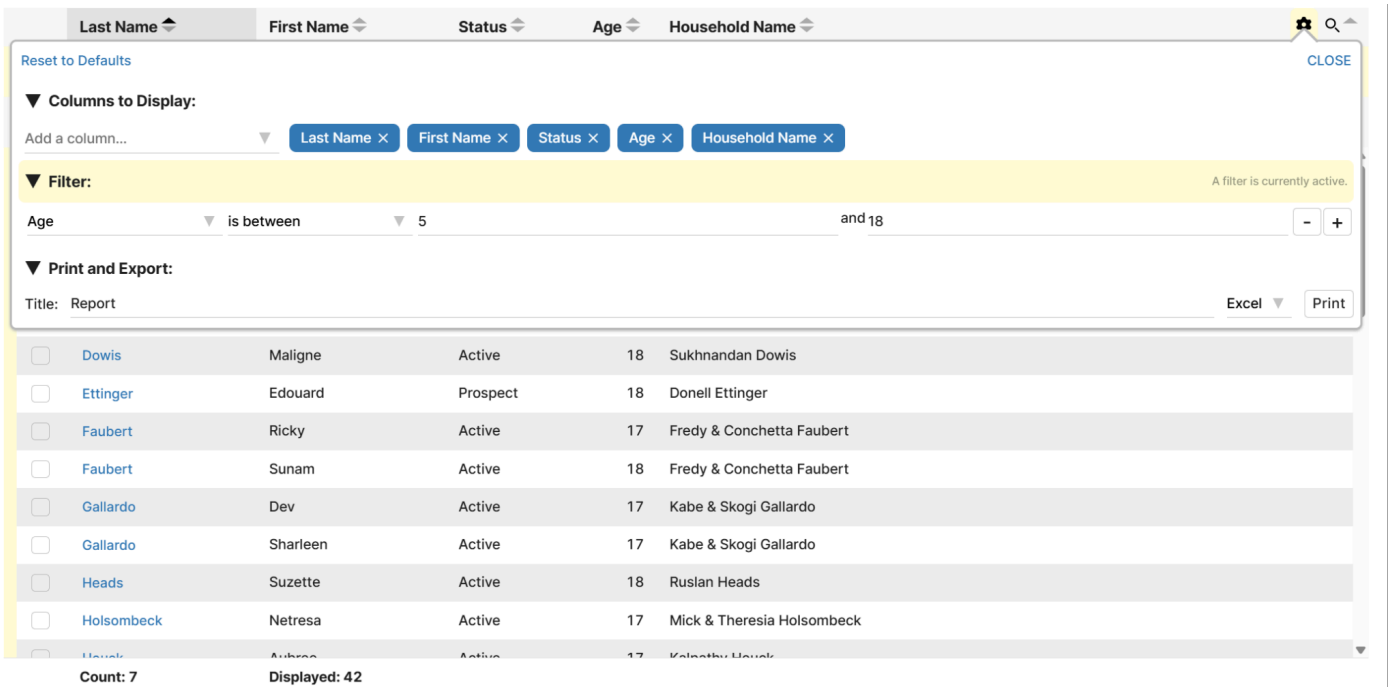
- You can sort and filter the individuals on the screen and choose what information to display.

1. To add additional columns, click the gear icon and check the items you wish to add.



2. Use the up and down arrows by the column headers to sort/view the individual columns.

3. To add additional filter options:
   a. Click the '+' (plus/add) button next to 'Filter.'
   b. Select the criteria you wish to search by, such as age
   c. Add the specification of 'equal to,' 'greater than,' 'less than,' 'is between,' etc.,
   d. Type in the specific criteria, such as '5' and '18' in the example below.



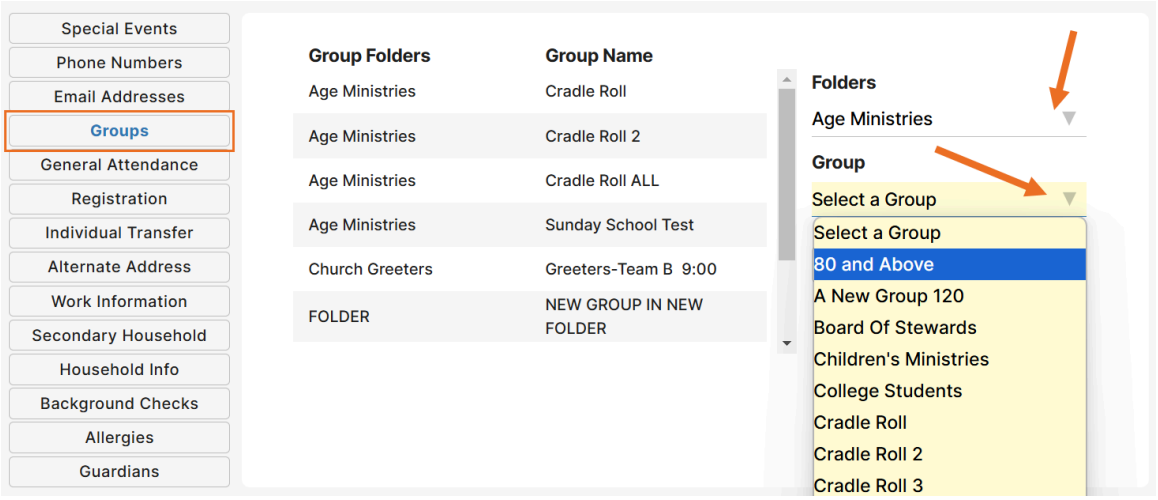
   e. You can remove filters on a particular search by clicking the '-' (minus/remove) button next to the filter you wish to remove.

5. Once you have the filter set up the way you like, you can use the 'Add All' button, which was previously discussed, to add individuals to the group in bulk based on the chosen criteria.

o From the individual's record:

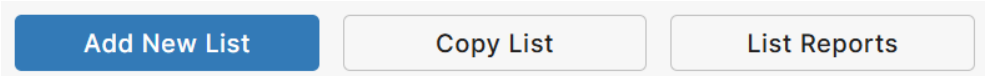
1. Go to People → Individuals

2. Click on the last name of the individual.
3. Once the individual record is open, choose 'Groups' on the bottom half of the screen (as outlined below).
4. Pick the Folder and Group you want to add that individual to.



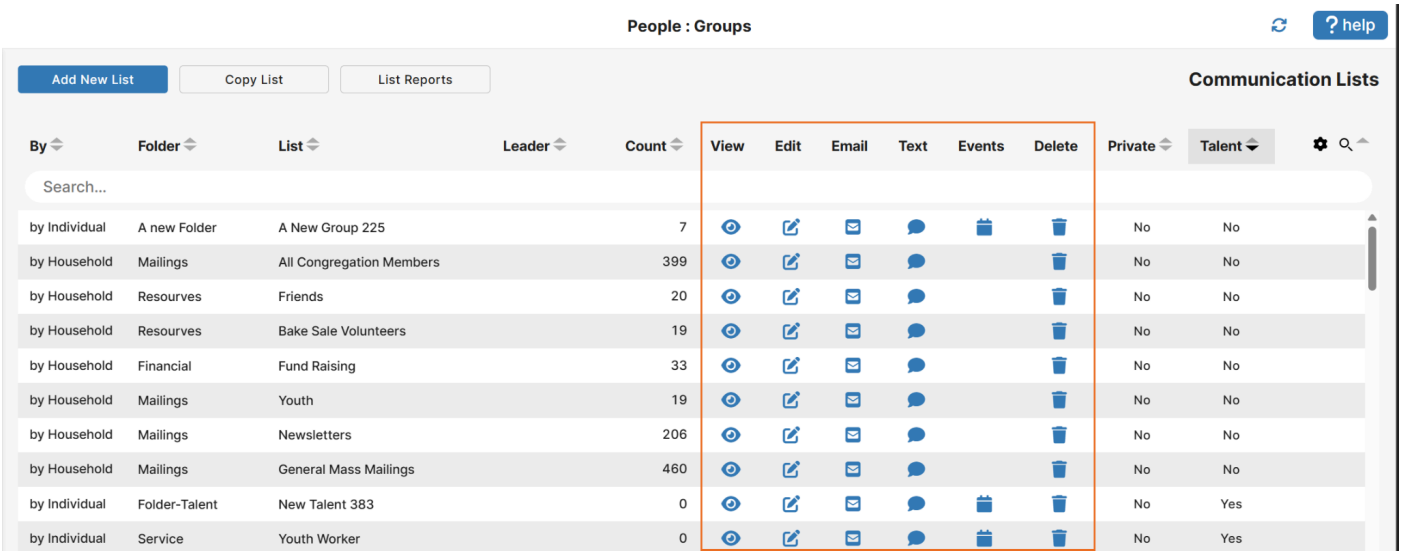
5. Click 'Add to Group. ' Once you have added that individual to the group, it will appear in the central list in the middle.
6. You can also remove an individual from the group in this window by clicking on 'Delete from Group' when the proper Folder and Group are selected.

o Buttons – In the Groups screen, there are 3 buttons at the top of the screen.



- **Add New List**– Refer to the Add a Group section of this guide.
- **Copy List:** This function copies all individuals from one group into another group. It does not remove them from the original group but adds them to the individuals already listed within the group you are copying to. Click 'Copy Assignments,' and when it is completed, "Copy Complete" will appear at the bottom of the screen. Click on 'Close' to return to the main group screen.
- **List Reports** – Click here to access the list of reports, labels, and exports about groups.

o Additional Functions—All other functions that can be performed will appear in the Group List, indicated by icons. Check the gear icon to verify that all functions are displayed in your view.



- View – Click the eye icon for any group to open the group. Here, you can view and search group members, quickly remove members, or create custom reports using the filters.
- Edit – Single-click on any folder or group name to edit the name, or use the edit icon to add or remove group members. You can also create custom group reports using the filters.
- Email – Clicking on the envelope icon will open another window and allow you to draft an email and add attachments to send to all group members. For more information on emailing in IconCMO, visit the Communications Guide.
- Text—This option allows you to send a text message to an individual group (it is not available in household groups). Clicking on the message icon in the Text column opens a screen for composing a text message. For more information on text messaging in IconCMO, visit the text and email groups section of this guide.
- Events—To set up and track attendance for group events, click on the calendar icon in the Events column for any group. Then, choose Add a New Event, type the event name, select a date and frequency, and click Add. To edit an existing event, select the date from the Event List drop-down box.
- Delete – Click the trash can icon to delete the group and its history, including group events.

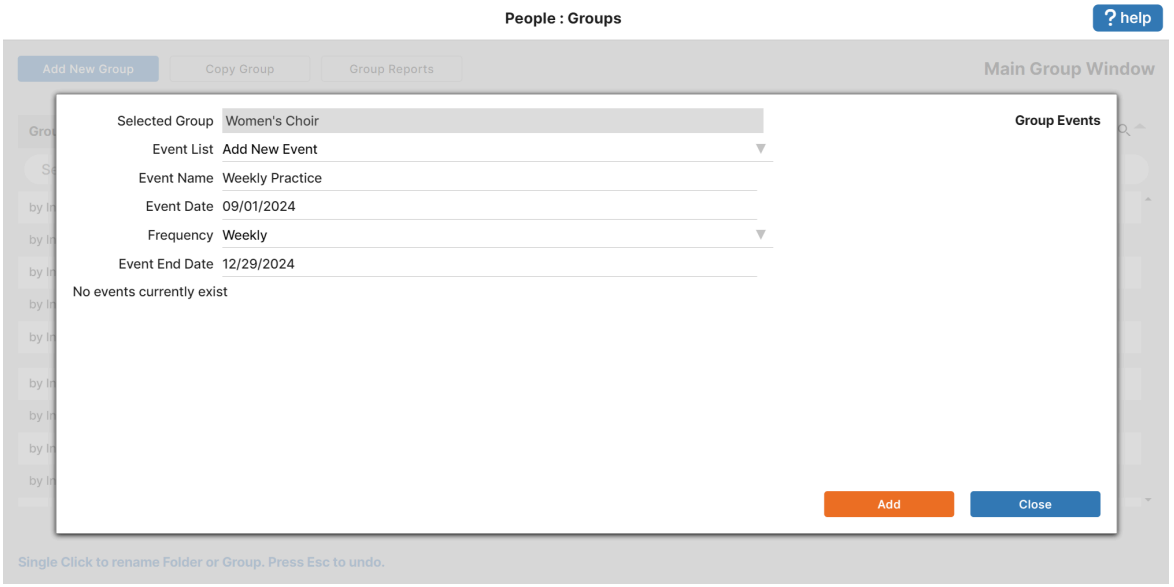
To learn more about emailing groups and setting up automatic birthday and anniversary emails go to the Communications Guide.

Create Group Events

This feature allows you to track attendance for a specific group.

1. You must first locate the group on the Groups screen.
2. Click the calendar icon under the Events column. This will open a new screen.
3. Choose 'Add New Event' from the Event List drop-down menu.
4. You will then have other fields to complete, such as Event Name, Event Date, and Frequency.
5. If it is a one-time event, choose 'Do Not Repeat. '

6. If this is a recurring event, select the frequency of how often the event occurs, and a new field will populate to select an Event end date.
7. When finished, click 'Add. '
8. You can add more events or click 'Close' when you are done.

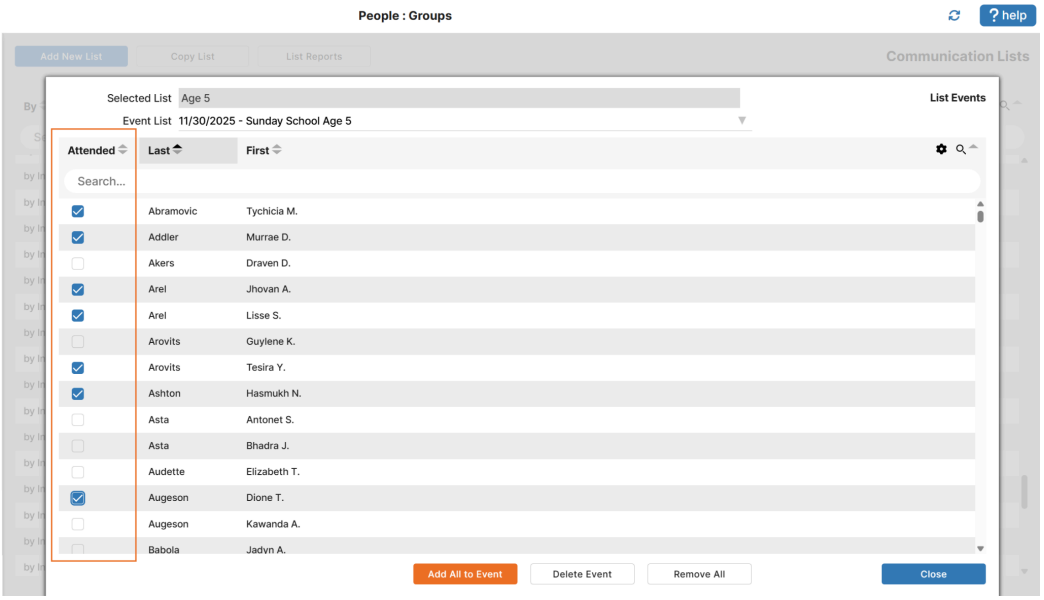


Note: Once created, events cannot be edited; they can only be deleted. Deleting the events is done by choosing the event from the Event List drop-down menu and clicking delete at the bottom of the screen.

Taking Attendance for Group Events

Once you have added a Group Event, you can track the attendance of those group members.

1. Click the calendar icon in the Groups screen next to your specific group.
2. Select the event you want to track attendance for from the 'Event List' drop-down menu. This will populate the list of members in that group.
3. Click the boxes next to the group members who were in attendance. Your selections are immediately saved.



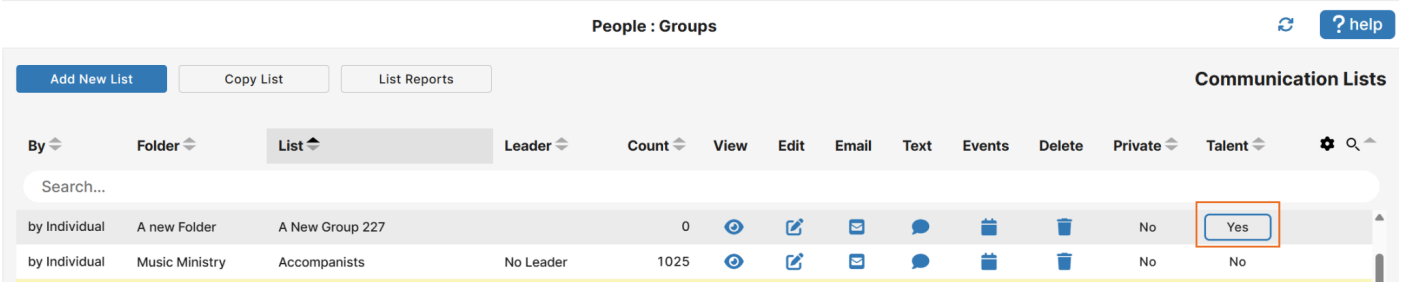
4. The ‘Add All to Event’ or ‘Remove All’ options will add or remove all individuals from the list displayed for the selected event. This is helpful when you know most of the individuals have attended—you can use the ‘Add All’ option and then uncheck the few who didn’t come to save time.
5. When finished, click ‘Close. ’

Add Talents and Assign Them to Individuals

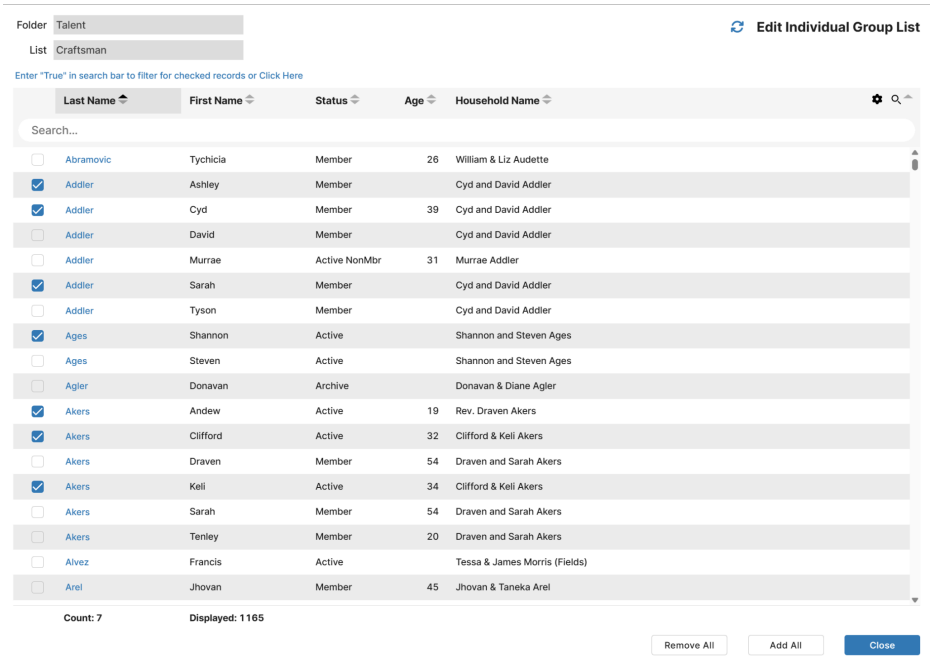
Talents can be assigned in one of two ways.

o From the Groups window:

1. Go to People → Groups.
2. Click ‘Add New List’ in the top left corner.
3. The window will focus on a new row. To edit folders or groups, overwrite the text by typing the folder, group, or talent name. The information will be saved automatically.

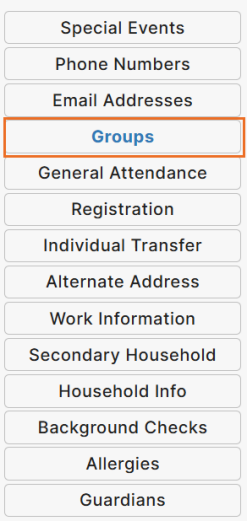


4. In the Talent column, click the button to toggle from ‘No’ to “Yes’ to indicate that the list is a talent list. All other groups in the same folder will be updated to a talent list.
5. To add or remove individuals from a talent group, click the Edit icon. This will open a list of all individuals.
6. Check or uncheck the box to the left of their name. Checked boxes indicate individuals who are part of that talent group.
7. You can also use the ‘Add All’ or ‘Remove All’ options at the bottom of the window to add or remove people in bulk.

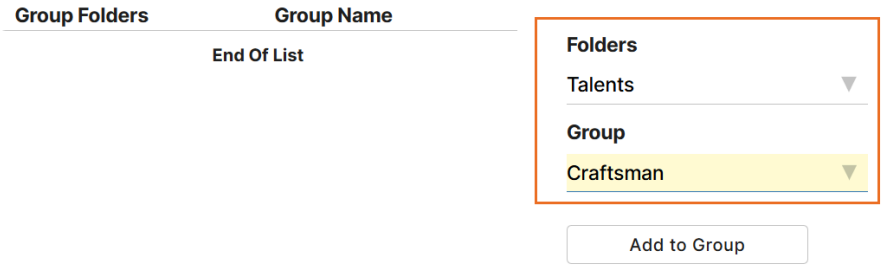


o From the Individual's record:

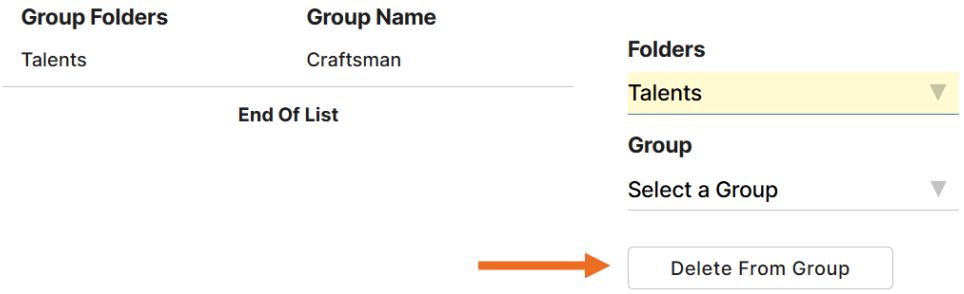
1. Go to People→ Individuals
2. Click on the name of the individual.
3. Once the individual record is open, choose' Groups' at the bottom half of the screen (as outlined below).



4. Pick the Folder and Talent group you want to add that individual to.
5. Click 'Add to Group.' Once you have added that individual to the talent group, it will appear in the central list in the middle.



6. You can also remove the talent group from the individual in this window by clicking on 'Delete from Group' when the proper Folder and Talent group are selected.



You are all set!